FILE

NEXUS

FileNexus Web Client
Administration Manual
Version 6.8

LORIS
Technologies Inc.

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Overview

The FileNexus Web Client is a web based alternative to using the FileNexus Client for searching, viewing, and managing documents archived to FileNexus. By providing users a web page to log into the FileNexus Web Client, administrators can quickly deploy an end-user document management tool and archival application without needing to install or upgrade software on end-user PCs.

Similar to the FileNexus Client application, the Web Client boasts a dynamic Search Results Grid, allows printing, downloading, annotation, and movement of documents, enabling users to customize their document management experience. The Web Client also provides the ability to conduct business processes or workflow through an easy to use and customizable interface. Users can quickly manage approval processes, data distribution, automatic email notifications, updating host systems, and keep abreast of outstanding items using the "My Tasks" feature. As with any FileNexus application, a user must first login to the Web Client to access any documents within the FileNexus System.

In addition to being a handy document management tool, users can now easily upload or archive new documents to their FileNexus system using the Archive Wizard add-on to the Web Client. Organizations with the Web Client and PC Data Module can upload new documents directly from any PC to FileNexus.

FileNexus Web Client Login

Starting the Web Client

To launch the Web Client, simply open your Web Browser (Internet Explorer 8 or higher, or the latest versions of FireFox or Google Chrome) and navigate to the Web Client URL. Typically, the URL will be of the format https://MyFileNexusServer/FileNexus/BrowserClient where "MyFileNexusServer" will be the name or IP Address of your organization's FileNexus Server (or the server on which the Web Client is installed).

Most organizations will set up a Desktop Shortcut to the Web Client for users. Alternatively you may bookmark the web address for easy access to the Web Client.

Regardless of the method that is used to access the FileNexus Web Client, you will require a valid FileNexus user name and password to log into the Web Client. Once you have navigated to the Web Client's page, enter your user name and password in the space provided and click **Login**. If you wish for your PC to remember your user name for subsequent logins to the Web Client, check the **Remember my Username** option before logging in.


If your organization is using *Single Sign On* authentication, you will be logged into the Web Client automatically if you have already signed onto the PC with a valid domain account and password.

Similar to the FileNexus Client, the Web Client allows users to quickly search for, and view archived documents in the FileNexus System. The following sections will review the searching, viewing, and document management features available to FileNexus users in the Web Client.

Changing Your Password

Once a user is logged into the FileNexus Web Client, he or she may then elect to change his/her password. To change your password, go to the drop down menu under the username in the right hand corner of the FileNexus Web Client. Select the 'change password' option from the drop down menu.

Change Password

Settings

Logout
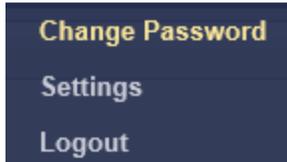
In the Password Dialog enter your new password in the Password field and then confirm your password by re-typing it into the Re-enter Password field. When you are finished click OK and your password will be instantly updated.
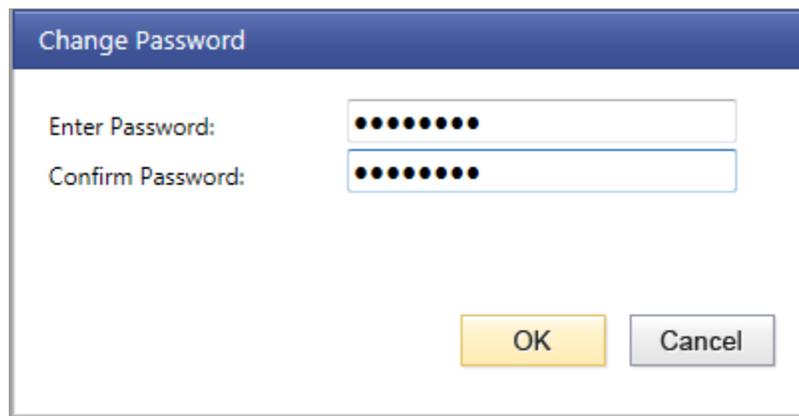
Change Password

Enter Password: ••••••••

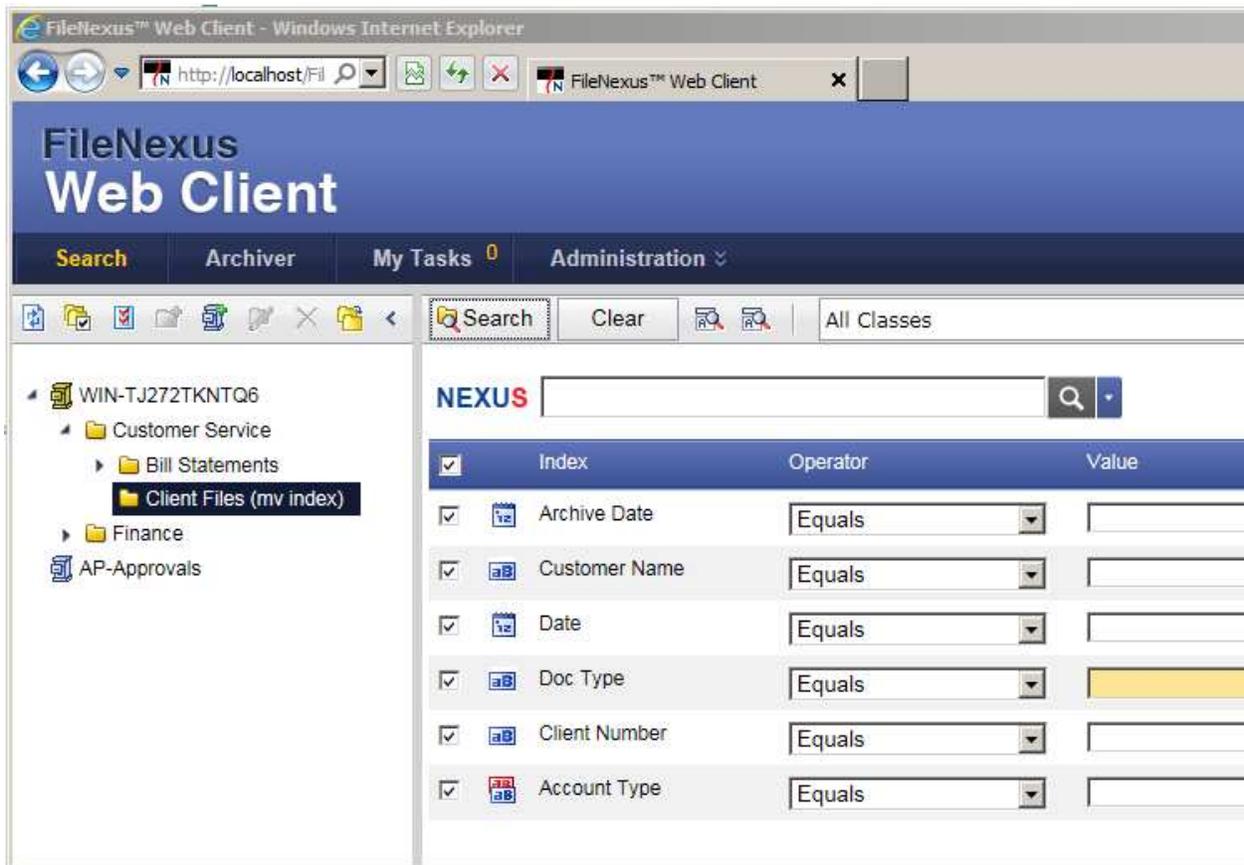Confirm Password: ••••••••

OK   Cancel

NOTE: A user may only change their password if they have security rights to do so, as set up by the FileNexus Administrator or a user set up as the Manager of that user or a group in which the user is a member. FileNexus password changes will have no effect if Active Directory Authentication is being used for logging into FileNexus.

The Folder Tree

The Folder Tree is a visual representation of how your documents are grouped or organized. Different users in various departments of the organization may have access to one or many folders within the structure. By selecting a single folder, you will be able to search on its contents, as well as the contents of possible sub-folders. From the Folder Tree pane, you will also have access (depending on your rights within the FileNexus System) to various document management functions via the Folder Tree Toolbar.

Folder Tree Toolbar

There are several icons in the Folder Tree toolbar that can help you manage and adapt your FileNexus environment. In addition, the Folder Properties window allows administrators to manage User and Group access to documents at the Folder and Index levels.

Refresh
By Clicking on the Refresh icon, you will refresh the folder tree after any folder additions, deletions, or movements take place.

Select Multiple Folders

By clicking on this icon, another window will pop up allowing you to select multiple folders and thereby providing the ability to conduct a "Cross Folder Search" when folders may not be organized under the same parent folder.
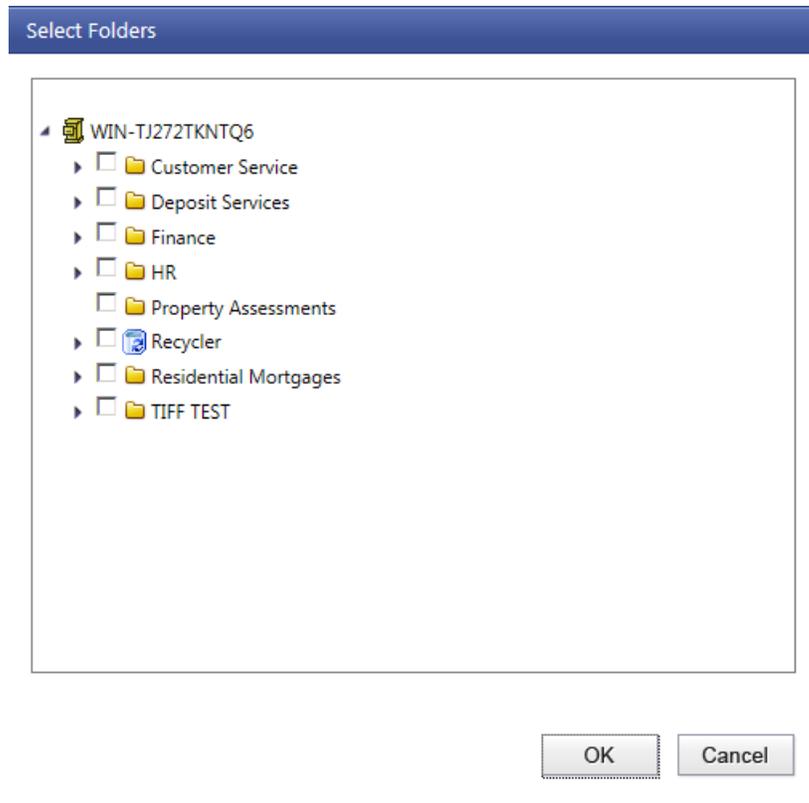
Folder Properties

By highlighting a folder and clicking on this icon, you will be able to view the properties (Document Classes of documents within the folder, Index IDs, Folder ID). FileNexus administrators can also manage User/Group level access to the documents in the folder. Please refer to the section on Folder Administration for more information.

Add Folder

If you have the appropriate rights in FileNexus, you may see the Add Folder icon enabled. To add a folder, simply highlight the folder or name of the server under which you wish to add the folder. Then, click the Add Folder icon and name the folder.

File Cabinet 📁

The File Cabinet icon allows you to access or set up a custom File Cabinet for your own searching needs. This feature is useful when performing regular cross folder searches.

Edit Folder ✏️

By highlighting a folder and clicking this icon, you can edit or rename an existing folder provided you have the appropriate user rights.
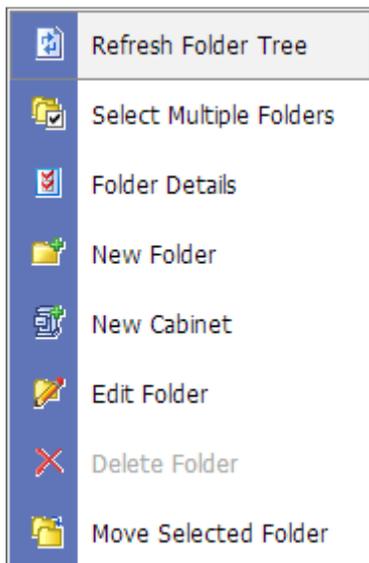
Delete Folder ✕

By highlighting a folder and clicking this icon, you can delete a folder that has zero archived documents within it provided you have the appropriate user rights. Also, the folder must NOT have any subfolders in order to be deleted. Any subfolders must first be deleted before a parent folder can be deleted.

Move Folder 📂

By highlighting a folder and clicking this icon, you can move a folder to another location in the folder tree provided you have the user rights. A window will pop up asking where you wish to move the folder to. Click **OK** after you make your selection or **Cancel** if you don't wish to move the folder.

NOTE: Depending on your user rights in FileNexus, some or all of the options in the Folder Tree tool bar may also be accessed through a convenient right-click menu.

| Refresh Folder Tree |
| Select Multiple Folders |
| Folder Details |
| New Folder |
| New Cabinet |
| Edit Folder |
| Delete Folder |
| Move Selected Folder |

Folder Administration

Folder Administration encompasses the granting of access rights to Users and Groups on documents archived to the FileNexus System. These access rights are also used to determine a user's ability to archive or import documents into the system by using the Scan Station, Client Archiver and Web Archiver applications.

Only FileNexus Administrators (or designated Power Users) will have access to the User and Group tabs when viewing Folder Properties. To change your User or Group access rights on FileNexus folders, contact your FileNexus Administrator.

Searching for Documents

A Search Example

After logging into the Web Client, the user will be able to view the same folder-tree structure they would have access to if they logged into the Windows Client. In the below example, after the user Brian logs into the system, he can view and search for documents in the folders shown below.

To begin searching for documents, you must navigate to and click on the folder you wish to search on, or the parent folder for the sub-folders you wish to search within. By default, you will be shown the simple **Index Search Pane**, as in the above example.

Searching on a Single Folder

To search on a single folder for documents archived to FileNexus, highlight or click on the desired folder. In our example, Brian will click on the *Client Files* folder. Notice that the name of the folder that is clicked on appears highlighted.
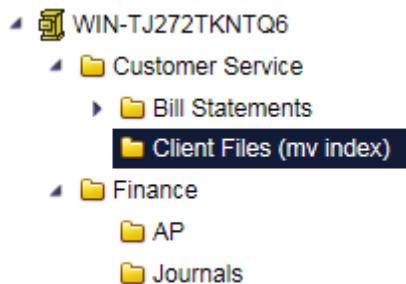
Once the user has clicked on a single folder, the index search pane will appear.

The Index Search Pane

To the right of the folder tree, an index search pane will appear allowing the user to enter any search criteria in the edit boxes provided before recalling matching document search results.

An example of a typical *Index Search* pane

In the above example, the user is searching for "CREDIT APPLICATION" documents in the selected folder. They would simply click the Search button to conduct the search and pull back the matching document results.

The NEXUS Search

The NEXUS search box provided allows you to enter search criteria that may exist in any applicable index value OR in the content of a full-text indexed document.
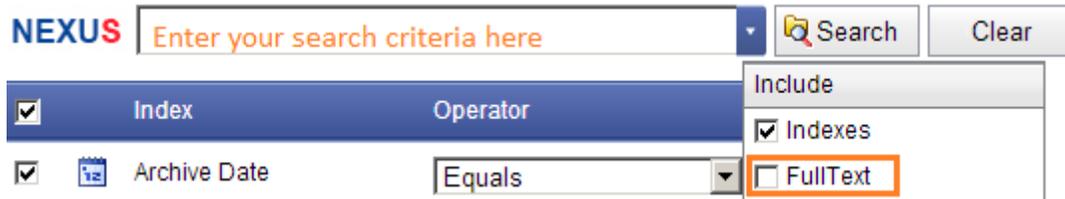
For example, by entering a string, only Text data type indexes will be searched along with the content of full-text indexed documents. If you enter a numeric value or date, all index values will be searched along with the content of full-text indexed documents.

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NOTE: By using the NEXUS Search, you can combine its capabilities along with any additional search criteria you may enter for specific indexes. Entered search values in the index value boxes **and** the NEXUS Search box must be true when recalling search results.

Advanced Searching

Most users most of the time will use the default searching in FileNexus, where they click on a folder and see a search pane similar to the ones in the previous examples. However, if you need to conduct a more "Advanced" search where you need one or more search criteria to be true OR another set of search criteria to be true, you may want to use the FileNexus Advanced Search feature.

To enable the Advance Search pane, highlight the folder you wish to search across and click the Advanced Search icon. Your search screen with then appear similar to the one below. You can toggle on and off the Advanced Search pane by clicking the same icon.

To create your advanced search query, select the first index for which you wish to add search criteria from the dropdown provided and click Add. This will launch another window in which you can enter the search value.

FileNexus™ Add Index Search Criteria

aB Doc Type

Choose Search Operator:

Equals

Logic Operator

○ AND

○ OR

Value ☐ Null

CREDIT APPLICATION

OK   Cancel

In the new window, choose the Search Operator and then enter the value in the edit box provided before hitting OK.

Your query may look something like this …

Advanced Search:

Doc Type   Add

Query:

"Doc Type" = 'CREDIT APPLICATION'

To continue building your query, keep selecting the appropriate indexes from the dropdown provided and hit **Add**. Then choose the Search Operators, Logic Operators, and enter values as appropriate each time hitting OK.

Advanced Search:

Doc Type ▼   Add

Query:

"Doc Type" = 'CREDIT APPLICATION' OR "Doc Type" = 'MONTHLY STATEMENT' OR "Doc Type" LIKE 'ACCOUNT%'

As your query grows, you can review it in the Advanced Search pane and hit Search when you're ready.

Any additional search criteria entered in the normal index search pane will also be applied when you hit Search.

The Index Data Types

Each icon immediately to the left of an Index name indicates the index's data type, and therefore is a good indication to you of what sort of information to enter in the *Value* column for search criteria.

Icon	Data Type	What to Enter
	Datetime	You can enter the date (mm/dd/yyyy) the date and the time (mm/dd/yyyy 12:00:00 AM) or select the date from a pop up calendar by double-clicking in the value edit box for an Index of a *datetime* data type
	Text/String	Enter any alpha or numeric string
	Text/String (Multi-value)	Enter any alpha or numeric string (which will be compared to each of the values in the Multi-value index)
	Numeric	Enter whole numbers only (0, 1, 2, …, 999, …)
	Currency	Enter a valid dollar amount with or without a decimal (100, 100.99, 1,000.00)
	Date	Enter a valid date format (mm/dd/yyyy or dd/mm/yyyy or mm-dd-yyyy or other common date formats) or select the date from a pop up calendar by double-clicking in the value edit box for an Index of a *date* data type

Index
This column contains the name of the indexes that exist on the documents within the folder.

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Operator
A drop-down containing the comparison operators available when filtering search results by an entered or selected index value.

Equals
Equals
Not equal
Less than
Greater than
Less than or equal
Greater than or equal
Contains
Starts with
Ends with
Between
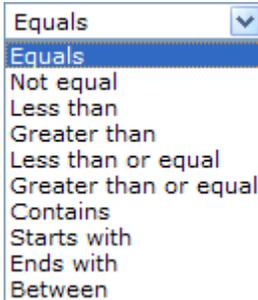
If choosing "Between" as your comparison operator, you will need to enter two values as in the example below. All other operators require only one search value.

Value
The value to compare against when filtering search results whether it is a string, date, numeric, currency, or other data.

Advanced Pick-lists
Some indexes will be set up to allow for pick-list searching. If an index has a pre-populated pick-list associated with it, indicated by a highlighted drop-down box, the user does not need to enter search criteria for the index, but simply choose the value from the drop-down provided as in the following example. Alternately, the user can auto-filter the pick-list items by keying in a word or characters in the highlighted drop-down.
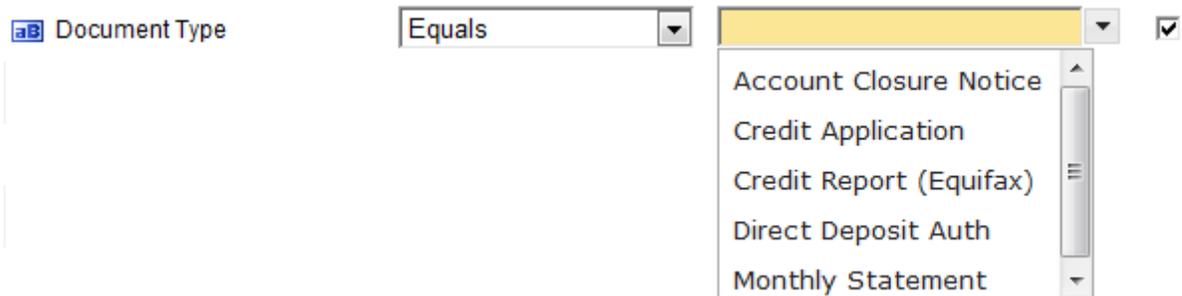
Display Checkboxes
Clicking on the checkbox to the left of the "Index" heading will toggle on/off all indexes for display in the search results. A user can also check on/off individual indexes for display in search results.

Search
Clicking on this button will prompt FileNexus to use the entered search criteria and retrieve any matching document search results.
NOTE: At least one index must be checked on for display or you will not receive any search results.

Clear
Clicking on this button will reset all the values to blank and all of the Operators back to "Equals". This is handy if you want to conduct a new/different search on the same folder as your previous search.

In a very basic search, you may select an operator, enter a value, and click Search.

Full Text Searching
If your documents are full-text indexed (meaning that they are set up for content searching), an additional edit box may appear above the indexes so that you may enter a character string you wish to search within the content of archived documents. Possible document types that can be full-text indexed include Word, .TXT files, Excel Spreadsheets, PDFs with text data, etc.
In the example below, the user is searching the *Journals* folder for any document containing the text *229.29*.

Customizing the Search Pane

The enhanced Web Client allows users to customize the search pane for their various documents and have the customizations persist based on the user's unique FileNexus login.

Customizing the Index Order

To customize the order of your search indexes for a given folder, simply drag and drop indexes to the desired position (either higher or lower in the index list).

In the above example, when you conduct a search (by clicking the **Search** button) after reordering the indexes, the settings will persist for "All Classes".

If you conduct a search on a specific Document Class within the folder by selecting it from the Class drop-down box, you will need to reorder your indexes for that class and hit the Search button to have your settings persist.

Customizing the Indexes to Display

To customize the indexes you wish displayed in your search results, simply check on or off the indexes in the Display column. Persistence for the index display will work the same as persistence for your index order.
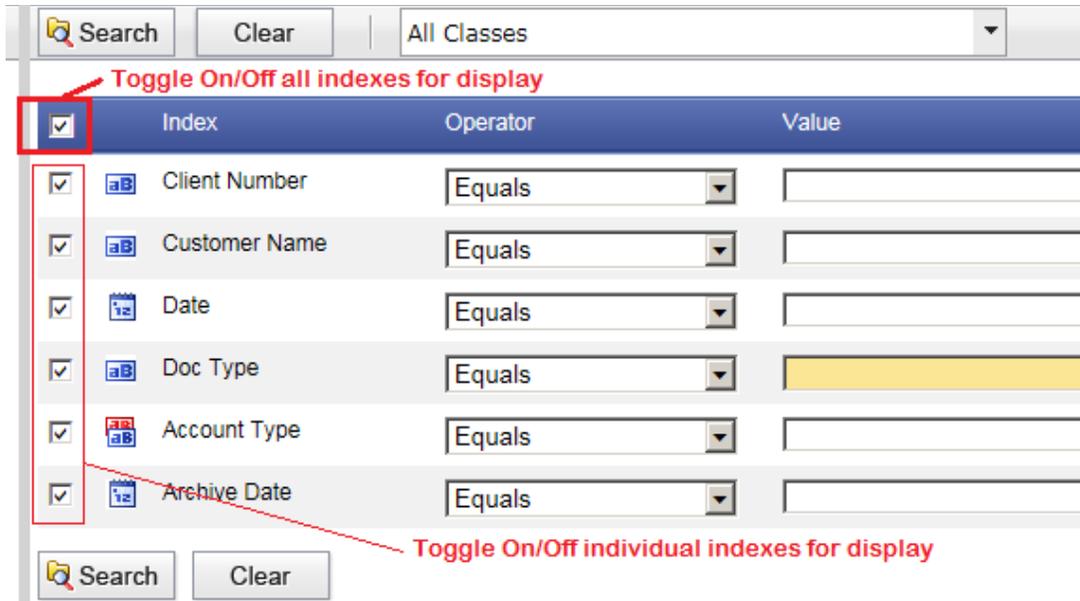
Hiding and Showing Search Indexes

By default, the index search pane will be set to *Hide unselected indexes*. What this means is that if certain indexes do NOT have a display checkmark turned ON for the search results, the index will also not show on the index search pane. Users can change this setting to Show hidden indexes by toggling off the open by clicking the icon.

In the below image, unselected indexes are being hidden from view, the icon is turned ON.
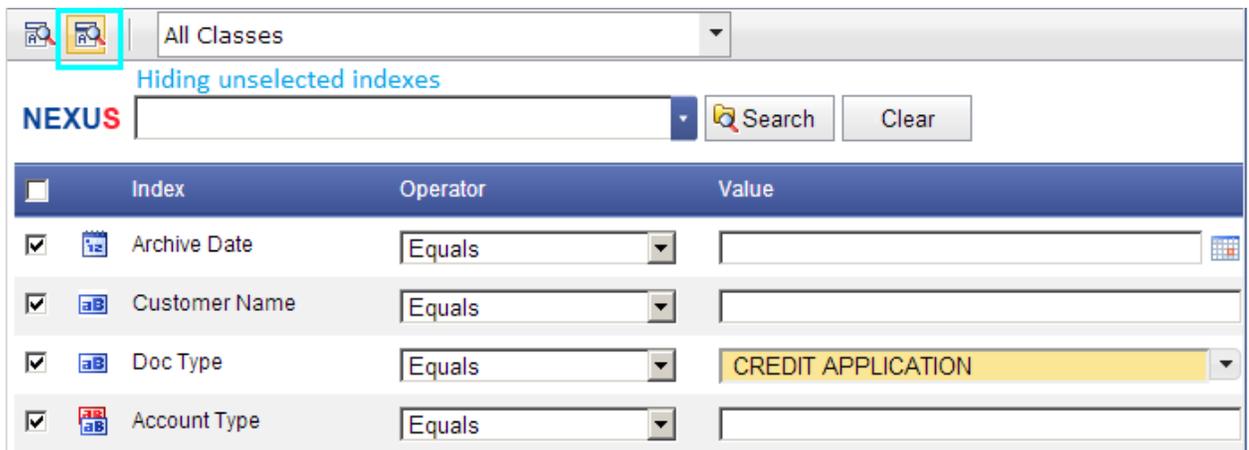
In this image, hidden indexes are being shown to the user (he/she may want to change their display preferences), the icon is turned OFF.

Conducting a Search

To conduct a search, follow these simple steps:

1. Choose the comparison operator from the provided drop down for the index you wish to filter your results by.
2. Enter or select the value in the *Value* edit box for the index you wish to filter your results by.
3. Ensure that you have checked on at least one index for display under the "Display" column or check the box beside the Display heading to turn on or off all indexes for display.
4. Repeat steps 1 – 3 for any additional index values you wish to employ to filter your search results.
5. If the documents you are searching for are full-text indexed (i.e. the *Full Text* edit box appears in your *Index Search* pane), you may choose to skip steps 1 and 2 and simply enter a string to search for in the *Full Text* edit box. You can also choose to combine full-text searching with entered index search criteria.
6. When you have completed entering you search criteria, click the *Search* button.
7. View, open, and manage the documents in the resulting *Search Results Grid*.

An example search to be conducted

Sub-folder Searches

When conducting a sub-folder search, search options are only slightly different.

To begin a sub-folder search, highlight or click on the parent folder in the folder-tree. This folder should have an arrow icon sign next to it indicating that it has one or more sub-folders.

In this example, our logged in user Kim will click on the Customer Service folder so she can include the sub-folders *Bill Statements* and *Client Files* in her search.
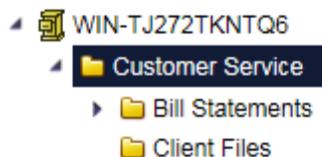
In the Index Search pane that appears, the user will have the option to include or exclude the subfolders in the subsequent search by clicking on or off the *Include Sub-folders* checkbox.
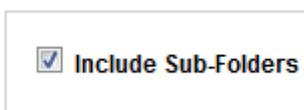
NOTE: The highlighted folder in the folder tree will always be included in the search for documents, even if Include Sub-folders is checked off.

After confirming whether to include subfolders or not in a search, Kim can proceed with her search as described in the previous section.

To review, the steps involved in conducting a sub-folder search are:

1. Highlight a parent folder (any folder with sub-folders) in the folder tree
2. Confirm whether sub-folders should be included in the search or not by checking on/off the *Include Sub-Folders* checkbox.
3. On the *Index Search* pane follow the steps from the previous section, "The Index Search Pane", which are reiterated below for your convenience.

From the section "The Index Search Pane"
To conduct a search, follow these simple steps:
1. Choose the comparison operator from the provided drop down for the index you wish to filter your results by.
2. Enter or select the value in the *Value* edit box for the index you wish to filter your results by.
3. Ensure that you have checked on at least one index for display under the "Display" column or check on the checkbox next to the Display header to select all indexes for display.
4. Repeat steps 1 – 3 for any additional index values you wish to employ to filter your search results.
5. If the documents you are searching for are full-text indexed (i.e. the *Full Text* edit box appears in your *Index Search* pane), you may choose to skip steps 1 and 2 and simply enter a string to search for in the *Full Text* edit box. You can also choose to combine full-text searching with entered index search criteria.
6. When you have completed entering you search criteria, click the *Search* button. View, open, and manage the documents in the resulting *Search Results Grid*.

Search Results

Once a search has been conducted on a single folder or on a parent folder and its sub-folders, the user can view their search results in a dynamic *Search Results Grid*. Document search results in the Web Client are presented to the user in a similar manner to the FileNexus Client.

Dynamic Search Results Grid

In the Web Client, if there are any search results to return, they will appear in a dynamic search results grid, as in the below example. This "dynamic" grid allows the user to manage their search results by providing the ability to group results by one or more indexes, reorder and resize index columns for ease of viewing, as well as open, save, and view documents.

	Action	Date	Client Number	Customer Name	Doc Type ▲	Account Type	Folder Name
☐		12/12/2008	223344	Jane Doe	ACCOUNT CLOSURE NOTICE	RESP; RSP Line of...	Client Files
☑		6/4/2008	556677	John Smith	ACCOUNT CLOSURE NOTICE	RESP; Terra Partner...	Client Files
☐		6/4/2008	668800	Gayle Night	ACCOUNT CLOSURE NOTICE	RRSP; RSP Line of...	Client Files
☐		6/2/2006	556677	John Smith	CREDIT APPLICATION	RESP; Terra Partner...	Client Files
☐		1/4/2008	223344	Jane Doe	CREDIT APPLICATION	RESP; RSP Line of...	Client Files
☐		6/11/2002	123456	RICHARD DENTON	CREDIT REPORT(EQUIFAX)	Residential	Client Files
☐		4/4/2008	223344	Jane Doe	DIRECT DEPOSIT AUTH	RESP; RSP Line of...	Client Files
☐		7/4/2008	556677	John Smith	DIRECT DEPOSIT AUTH	RESP; Terra Partner...	Client Files
☐		6/4/2008	556677	John Smith	MONTHLY STATEMENT	RESP; Terra Partner...	Client Files
☐		6/4/2008	556677	John Smith	MONTHLY STATEMENT	RESP; Terra Partner...	Client Files

Drag a column header here to group by that column

If there is a multi-value index in your results, the values will appear in a comma separated list. Hover over a cell to see all of the values for a specific document.

Page 1 of 2 (12 items) < Prev [1] 2 Next >

Options to Open/Save the document as a PDF or view it in the Web Client viewer

Action column
The Action column from the document search results page, displays the actions that are available with regards to the document.

Click on the 📄 icon to save or open an archived PDF document, or an archived Text or Tiff document that will convert to PDF on the fly.

Click on the 📄 icon to view a Tiff or Text document in the embedded viewer. For detailed explanation about the embedded viewer, please refer to the 'Embedded Viewer' section.

Other document types will display their native application's icon in the Action column allowing the user to open or save the document.

NOTE: Many PC files like Word, Excel, Visio, AutoCad, and others will not be viewable in the embedded Web Client viewer but will automatically invoke their native application's viewer when the document's icon is clicked in the Action column.

Click on the 🗒 icon in order to view notes that may be associated with a document.

Document Status Bar
The status bar at the bottom of the grid will display how many results were returned from the search, and how many grid pages there are containing the total results. For example, in the below image, we can see a total of 23 documents were returned from the search, and they span 2 pages (Page 1 of 2). This is because the maximum number of documents per page is set to 20. The current page of results being viewed will appear in bold and square brackets []. You may click on the blue page numbers to move between pages or use the provided navigation arrows for Prev and Next.

Page 1 of 2 (23 items)   < Prev   **[1]**   2   Next >

Search Results Grid Features

Reorder Index Columns
To reorder your index columns, simply click on and drag the column header to the desired location in the header row. In the below example you can see that "Document Type" starts in between the "Customer Name" and "Account Type" columns and is then moved to the right of "Client Number".

	Action	Client Number	Customer Name	Document Type	Account Type
☐	🔴📄📘	223344	Jane Doe	Monthly Statement	RESP, RSP Line of Cr...
☐	🔴📄📘	556677	John Smith	Monthly Statement	RESP, Terra Partners...

	Action	Client Number	Document Type	Customer Name	Account Type
☐	📄📄📄	223344	Monthly Statement	Jane Doe	RESP, RSP Line of Cr...
☐	📄📄📄	556677	Monthly Statement	John Smith	RESP, Terra Partners...

NOTE: Reordering index columns <u>will persist</u> for subsequent searches on the same folder/document class based on your unique FileNexus login.

Resize Index Columns

To resize the width of your index columns, simply hover your mouse over the grid lines between column headers until the double-sided white arrow appears. You can then click and drag the grid's vertical line marker to the left or right to resize as necessary.

	Action	Client Number ↔ Document Type		Customer Name
☐	📄📄📄	223344	Monthly Statement	Jane Doe
☐	📄📄📄	556677	Monthly Statement	John Smith

NOTE: Resizing index columns will not persist for subsequent searches on the same folder/document class. The modified column widths will only stay in effect for the current search results session.

Search Results Toolbar

There a number of options to manage your document search results through the Search Results Toolbar as seen below.

Many (but not all) of the same options are also available by right-clicking on a document to view the right-click menu.
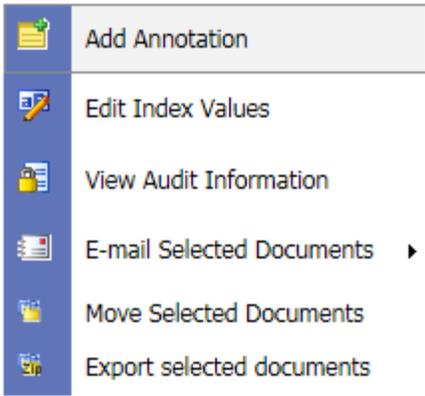
Back
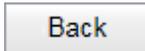
Click the *Back* button to return to the *Index Search* pane where your most recent search criteria will still persist for the same folder(s) being searched.

Refresh 📄

Click the *Refresh* button to refresh the search results being displayed.

Enable/Disable Grouping 📄

When this option is enabled, you can use the "Group By" feature to better organize your search results. To do this, click and drag the index column heading you wish to group your results by, into the grey area below the search results toolbar. You can group by more than one index by dragging additional column headings to the grey area.

In this example, search results are grouped by the 'Document Type' index.
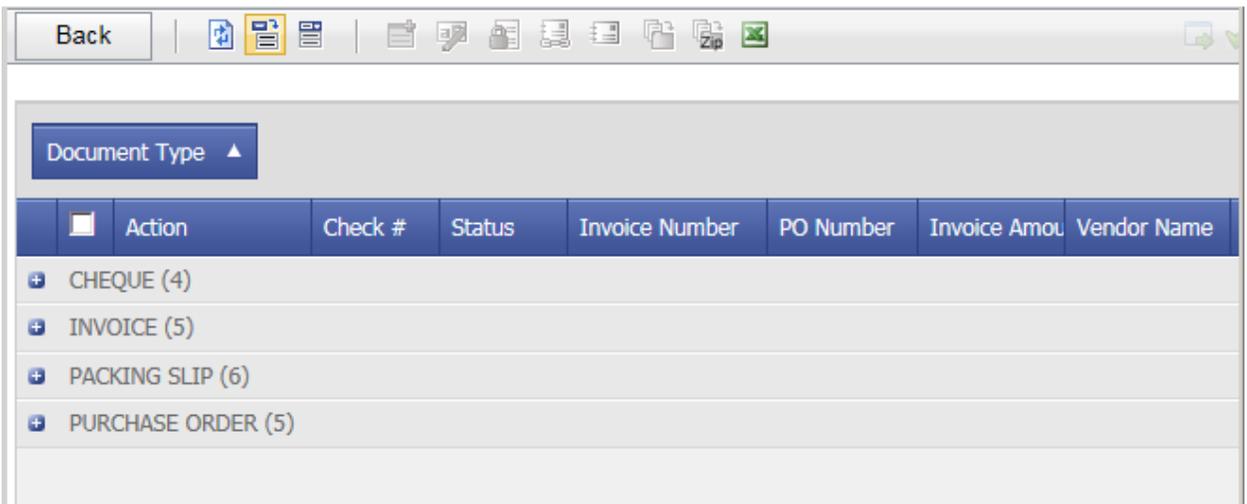
Enable/Disable Filtering 📄

Enabling this feature allows users to filter search results by displaying filter edit boxes above index values.

To filter search results, enter all or a portion of the index value you wish to filter by in the provided edit box(s). The results will filter automatically as the user enters a value.

In the following example, the user is trying to narrow down the search results to include only Purchase Orders by keying in 'purchase' in the Document Type index filter box provided.

Add Annotation
This feature can be used either by right clicking on a document or selecting the document and clicking the annotation icon from the search results toolbar.

To add a note or annotation to one or more selected documents, click on the Add Annotation icon. This will launch an *Add Annotation* text window.

After you enter your note, click OK to save or Cancel to cancel the note. When adding an annotation, FileNexus will automatically stamp the username and system date and time on the note.

Edit Index Values
This feature can be used either by right clicking on a document or selecting the document, and clicking the Edit Index Values icon.

When the Edit Indexes window appears, simply key in or correct the value you wish to update in the edit boxes provided or select the value from in input pick-list, and hit OK to save your changes or Cancel to discard your changes.

If you are editing a Multi-value index, click on the ellipses icon to open a Modify MultiValue Index window, like the one shown below.

Key in new values in the blue highlighted box provided and click **Add**, or remove values by highlighting the value and clicking on the X icon. Hit OK to save your changes or Cancel to discard them.

If you need to update the index value of multiple documents, select the appropriate documents in the search results list by clicking on the checkboxes beside the document row, and click on the **Edit Index Values** icon as normal.

Multiple selected documents

	Action	Check #	Document Type	Status	Invoice	Invoice Date	Vendor Name
☑			PURCHASE ORDER	Data Entered			SUPER DATA COMPUTERS
☑		200	PURCHASE ORDER	Paid	222	1/30/2009	SUPER DATA COMPUTERS
☑		200	CHEQUE	Paid	222	1/30/2009	SUPER DATA COMPUTERS
☐		100	PURCHASE ORDER	Paid	111	2/1/2008	SUPER DATA COMPUTERS

The Edit Index Values window will appear with all of the index value boxes greyed out. Check on the index you wish to update, and enter it or select in from the dropdown provided. Hit OK to save your changes or Cancel to discard them.

Edit Index Values

Modifications to selected indexes will be applied to all selected documents

	Index	Value
☐	Document Type	
☑	Status	Cancelled
☐	PO Number	
☐	Invoice Number	
☐	Invoice Date	
☐	Invoice Amount	
☐	Check #	
☐	Check Date	
☐	Check Amount	
☐	Barcode	

OK   Cancel
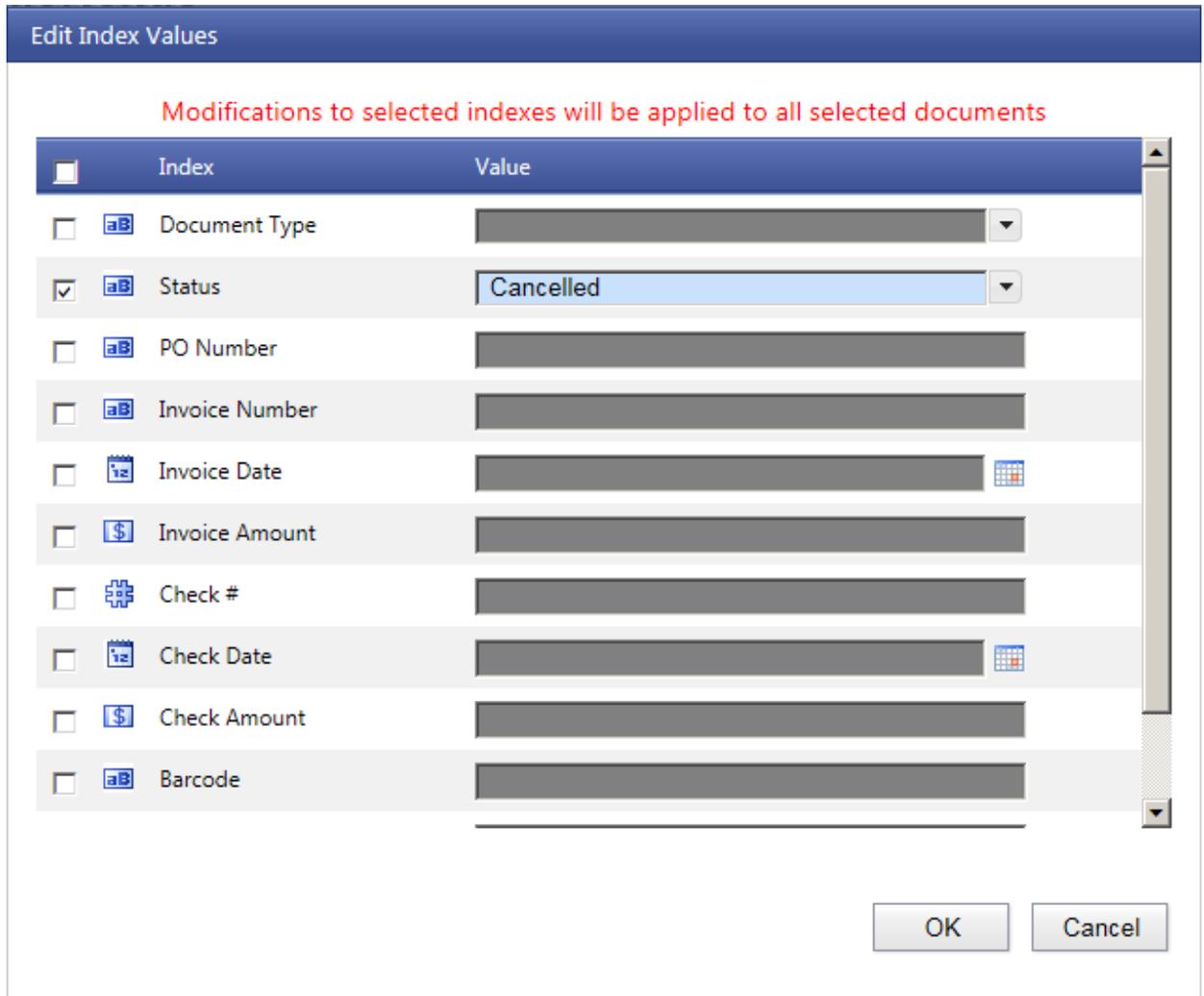
View Audit Information

The Audit Log is a secure and complete account of everything that has occurred to a document from the time it enters the FileNexus system. This allows you to view exactly who has accessed a document and what has been done to it.

FileNexus automatically logs each instance a document has been viewed, had notes added/removed, emailed, downloaded, moved between folders, or managed in any way, as well as stamps the date time and user id that carried out the event. By highlighting an entry in the top pane of the Audit Log tab, any available additional information about the event will be displayed in the Audit Record details

Only users with the proper access levels may access the Audit Information for a document. By clicking on the View Audit Information icon, an *Audit Information* window will pop up allowing an Administrator to review all of the actions on a document since being archived to the FileNexus system.

Audit Information		
Audit Date	**User**	**Action**
5/19/2011 4:41:24 PM	Kim	Annotation Retrieved
5/19/2011 4:41:21 PM	Kim	Added Annotation
6/22/2009 9:19:07 AM	SA	Downloaded Document
6/19/2009 4:25:55 PM	SA	Downloaded Document
6/4/2009 4:55:41 PM	SA	Moved Document
9/24/2008 8:46:55 AM	SA	Moved Document
9/24/2008 8:46:25 AM	SA	Downloaded Document
9/24/2008 8:45:59 AM	SA	Archived Document

More Information

OK

E-Mail DirectLink URL
This option allows you to email the direct link for this document to other FileNexus users. By clicking this icon, FileNexus will automatically invoke your default email program (Outlook Express, MS Outlook, Gmail, etc.) and allow you to send the link to this document in the body of the email. Only FileNexus users will be able to view the document.

This method for sending documents the following benefits and applications:

1. You can use documents links when you want to e-mail a document to someone in your organization who has access to FileNexus. Since the document link is only a pointer file it is very small and takes up very few network resources. This is much more efficient than mailing the actual document.

2. Another use for document links is to help integrate FileNexus with your existing work flow solution. In this example, you might want to export all new invoices to a set of document links. These links would then be put through your existing work flow. Each time someone clicks on a link, the original FileNexus document will appear on his/her screen.

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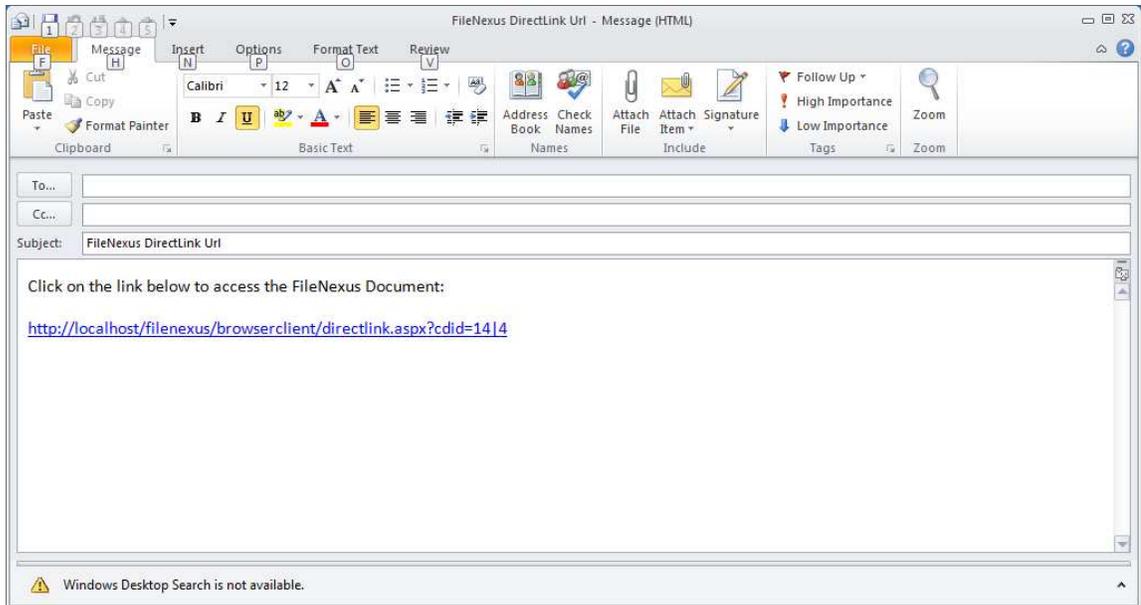
E-Mail Selected Documents

This option allows you to email the active document in the Search Results Grid. By clicking on the send icon, FileNexus will prompt you to enter the recipient's email address and send the document as an attachment in its native file format (tiff, .doc, .xls, .txt, etc.).

Move Selected Documents

This option allows a user with the appropriate user access rights to move documents between folders. Simply highlight the document(s) in the Search Results Grid that you wish to move and click the icon to select the new destination folder.

Export Selected Documents

This option allows you to export and save a copy of the selected documents in their native file format in a single zip file.

Export results as CSV file

By clicking on this icon, the entire search results list of index values will be exported to a CSV file for import into Excel for your reconciliations or reporting needs. When you click this icon, you will be prompted to Open or Save the CSV file.

Viewing Scanned Tiff Documents

When open a Tiff image document, the document is viewed in the FileNexus embedded viewer. Please note that other document types will display their native application's icon in the Action column allowing the user to open or save the document.

Embedded Viewer toolbar

Print
The printer icon allows you to print the current document in the preview pane. Upon clicking the printer icon, a print dialog page will appear allowing you to select print options, such as number of copies.

E-Mail DirectLink URL
This option allows you to email the direct link for this document to other FileNexus users. By clicking this icon, FileNexus will automatically invoke your default email program (Outlook Express, MS Outlook, Gmail, etc.) and allow

you to send the link to this document in the body of the email. Only FileNexus users will be able to view the document.

E-Mail Selected Documents
This option allows you to email the active document in the Preview Pane. By clicking on the send icon, you will be prompted to enter the recipient's email address. FileNexus will then email the attached document to the recipient.

Move Selected Documents
This option allows a user with the appropriate user access rights to move documents between folders. Simply highlight the document(s) in the Search Results Grid that you wish to move.

Rotate Document
The rotate icons allow you to rotate the document (rotate left, right and 180 degrees)

Expand Document
This option allows you to expand the document to the full width of the page.

Zoom Document
This option allows you to zoom in or out of the document or select the zoom percentage for the document.

Document Pages
This option allows you to scroll through the different pages of the document or jump to a certain page by selecting the page number from the page drop down.

Document Navigation
This option allows you to browse through documents in the search results grid by clicking the *Next Document* and *Previous Document* without having to exit the viewer and opening the next document.

View Document Notes
This option allows you to view annotations on the document. Once you click the *View Notes* icon, the notes are displayed on the document as the example below illustrates.
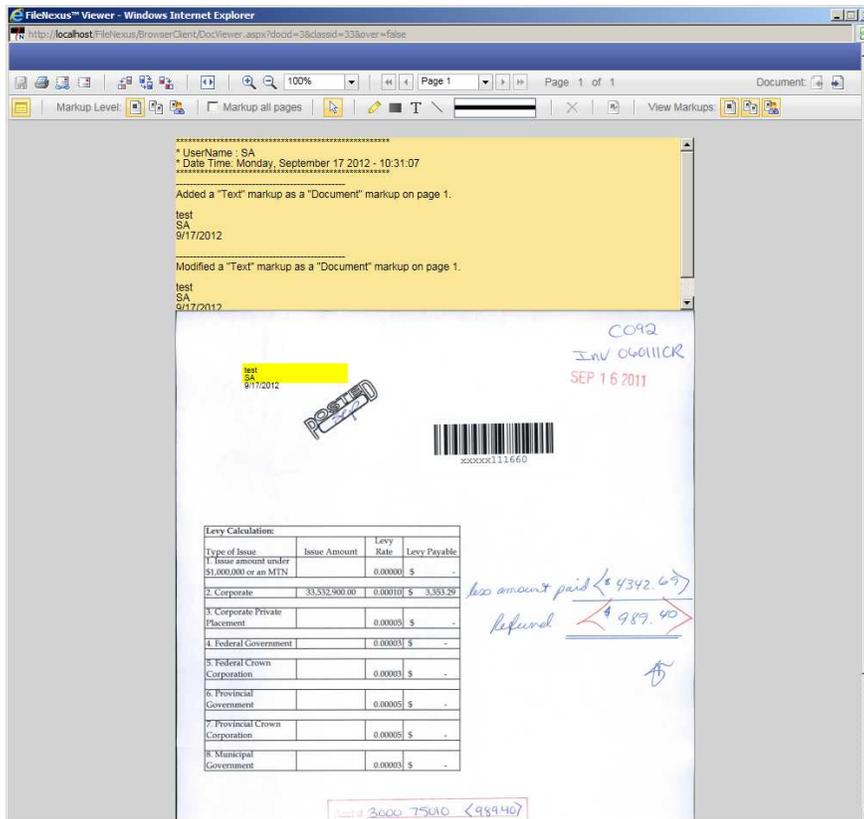
Select Markup

The Select Markup icon allows you to select markups that already exist on an image document (Tiff, jpeg, gif) and move or delete them. Click on the Select Markup Icon, then click on the existing markup on the document and hit Delete or drag the markup to another location on the page. Once you have modified the archived document, you can click the Save icon to save your changes.

Highlighter Markup

This option allows you to highlight areas of the current document clicking and dragging your mouse to select a zone. If you wish to change the highlighting colour, right-click on the highlighted area and select Properties. This will prompt a popup window, allowing you to modify the colour.

Blackout Markup (Filled Rectangle Markup)

This option is useful if there is sensitive information on a document you do not want others to view. Simply click the Filled Rectangle Markup icon, then left-click and drag your mouse within the current document to select a zone you want "blacked out" or hidden from view.

Line Markup

The line markup tool is helpful if you want to draw a link between two or more items on a document. Click on the Line Markup icon and left-click and drag you

mouse from point A to point B on the current document to "draw" a line. After you have drawn a line on the document, you can resize, move, or delete it.

Text Markup T

If you wish to put an electronic "post-it" type of note on an image document, click on the Text Markup icon. Then, "draw" a box onto your document. This will open up a Text Properties dialog for you to enter text into.

You can change the text font or background colour by clicking on the Text Font or Background Color buttons. If you don't wish the text markup to obscure the image, turn on the transparent checkbox. Then click OK. The text markup will then appear on the document with the user login name and date stamp visible.

Markup All Pages ☐ Markup all pages

If you want your markup to appear on every page within a document, and in the same place, click on this icon before creating the markup.

Markup Application Level Markup Level: ▣ ▣ ▣

In addition to the type of markup that can be applied to an archived document (Highlighter, Filled Rectangle, Line, Text, or All Pages), FileNexus distinguishes three Markup Application Levels: Document, Class, and User. The Markup Application Level defines how a markup will be applied to a document(s) and who will be able to view it.

Document Markup ▣

A Document markup will create a markup only on the current document. This markup will then be viewable by all FileNexus users that have the access rights to view the current document and the document markups.

Class Markup ▣

A Class markup will create the same markup as on the current document, on every document with the same document class (e.g. all Outbound Invoices, or all Time Sheets). The class markup will apply not only to all currently archived documents of the same document class, but all documents of the same class that will be archived in the future. This markup will then be viewable by all FileNexus users that have the access rights to a) view the current document and b) to view class markups.

User Markup ▣

A User markup will create a markup on the current document only visible to the user that created it. This is useful if a user wants to leave himself/herself an electronic reminder note on a document that some action has taken place or needs to be taken.
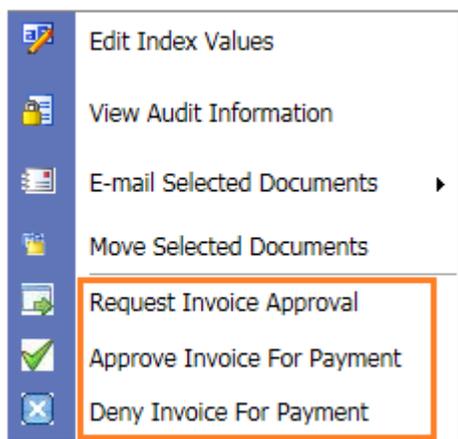
Workflow within FileNexus

FileNexus Workflow

When business workflows are defined and configured in FileNexus, users may see custom **Workflow Buttons** or custom defined Workflow Actions in a right-click menu when managing archived documents.

Workflow Buttons

Example buttons

Example custom workflow actions

Workflow processes may include (but are not limited to) approvals, signatures, information requests, automated document routing, automated email notifications, data updates of host systems, etc.

For further information on defining and configuring workflows in FileNexus or for a demonstration, please contact Loris Customer Support at 416 252-4701 ext. 230.

My Tasks

If a workflow process has been configured in FileNexus, users that are assigned workflow tasks may receive real-time notifications in the My Tasks section for outstanding tasks.

For more information on setting up workflows or for a demonstration, please contact Loris Customer Support at 416 252-4701 ext. 230.

My Reports

Configuring Custom Reports

The **My Reports** menu provides users the option to view custom reports that have been configured by a FileNexus administrator. Custom reports can be configured to report on any number of predefined criteria as in the example below.
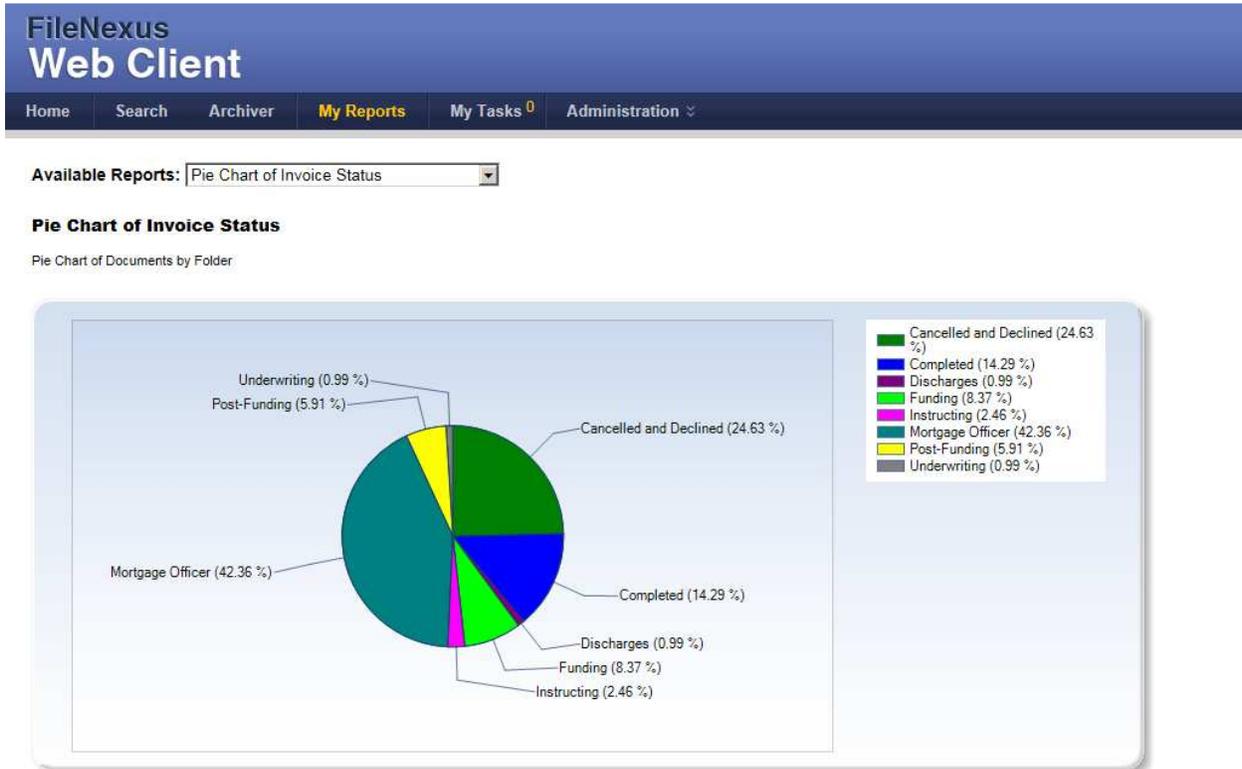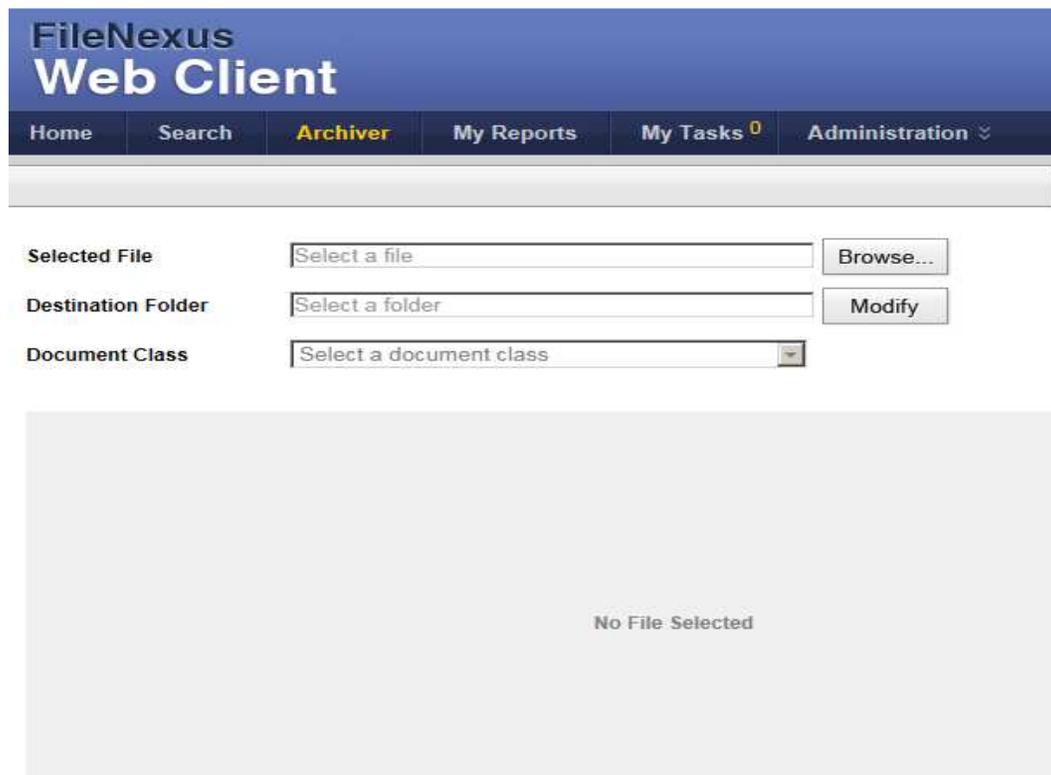

Custom reporting can be configured for any number of documents captured in FileNexus, detailing the current status of business workflows, breakdown of categories of documents, user activity in FileNexus, etc.

For more information on configuring custom reports or for a demonstration, please contact Loris Customer Support at 416 252-4701 ext. 230.

Archiving Documents

Within the FileNexus web client users can archive documents to FileNexus using the **Archiver** menu selection.

Selecting the **Archiver** menu will display a dialogue which will allow users to select which documents they wish to archive to FileNexus.
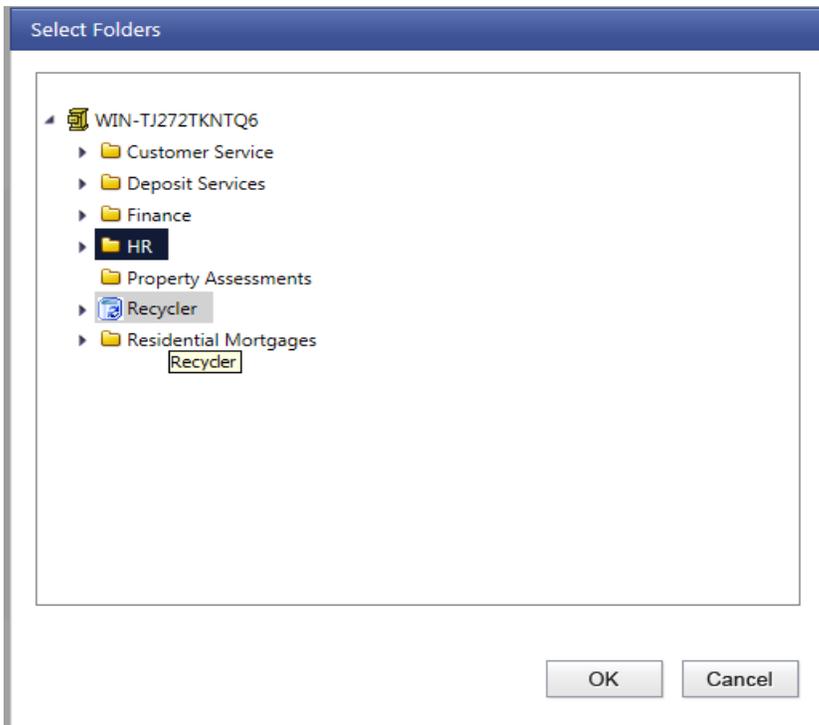

Browse

Choosing this menu button will open up a window which will allow the user to choose which file they want to archive.
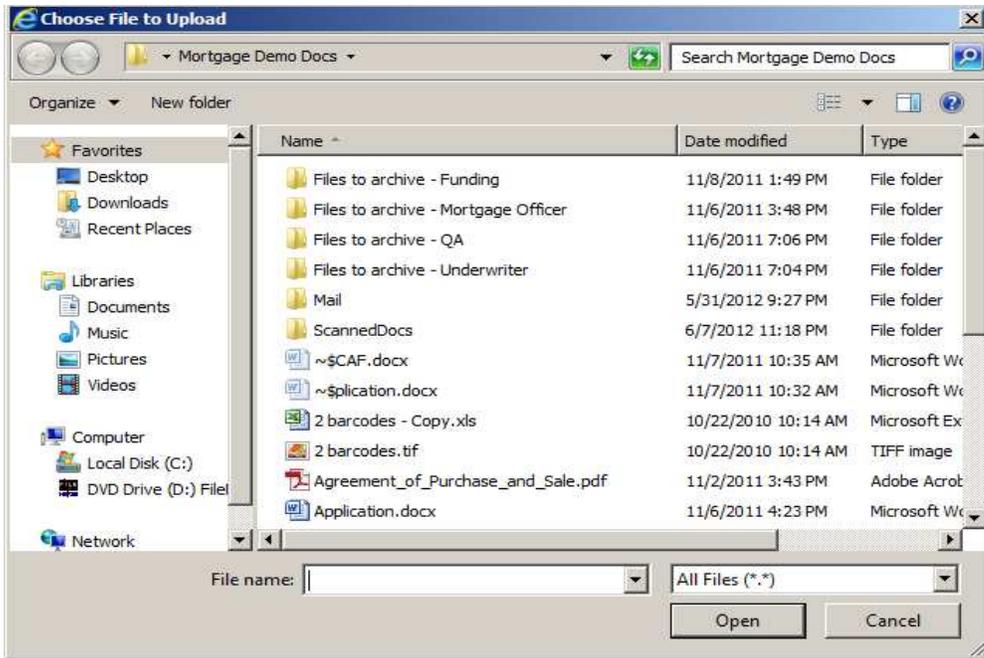
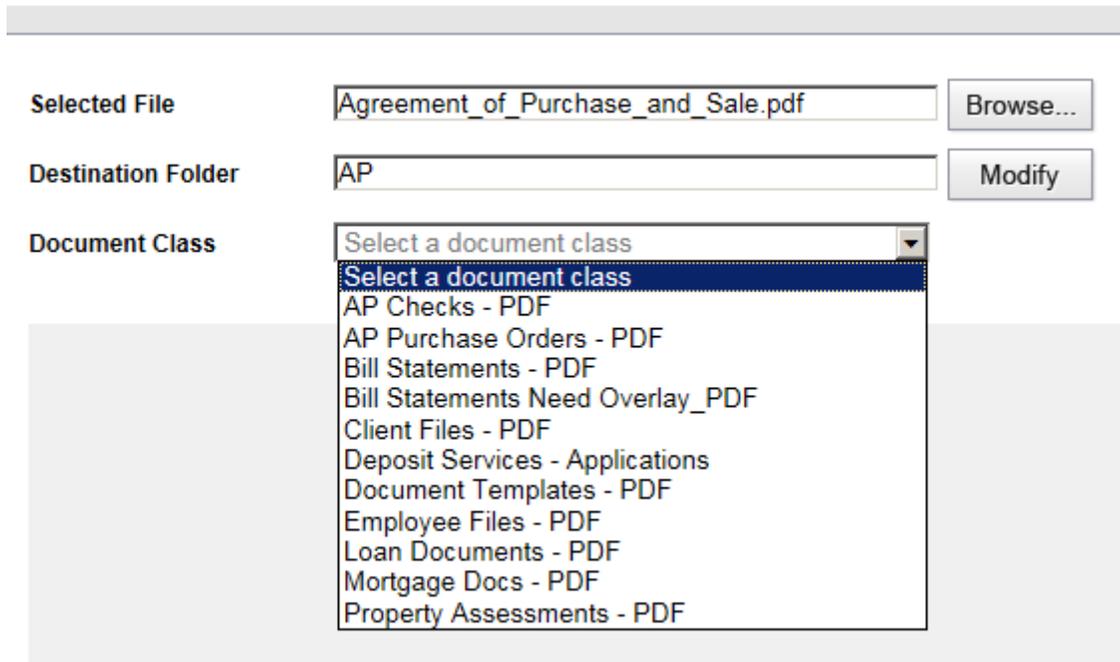## Modify

Choosing this menu button will allow the user to choose which folder the selected file will be archived to within FileNexus
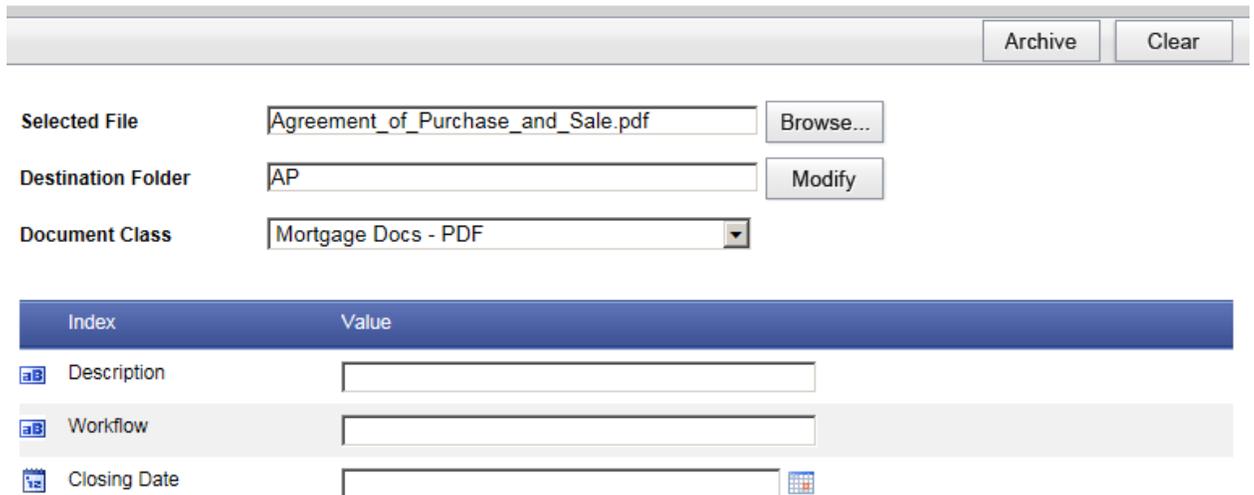
Document Class
Selecting this drop down menu will present the user with a list of document classes that can be applied to the document selected for archive.

Once a document class has been selected, you will be prompted to enter the associated index values.

Once all the appropriate indexes have been entered, you can click on the Archive button to archive the documents into FileNexus.

Web Client User Menu

The Web Client includes a user menu in the top right corner of the browser. From here, a user can change their password (covered previously), manage user settings that can persist for the user logged in, or logout of the Web Client by simply selecting Logout.

User Settings

To access the settings screen, click on your user name from the top right hand and select the Settings option.
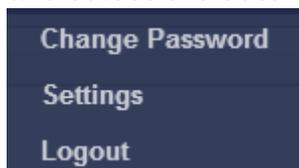
The following Settings window will appear.

General Tab

Enable BrowserClient Keep-Alive
By checking ON this option, any predefined timeout period will be ignored if the Web Client browser is still open on a user PC, but does not have any activity for a prolonged period. Perhaps the user went to lunch or is away from their desk, for example. If this opt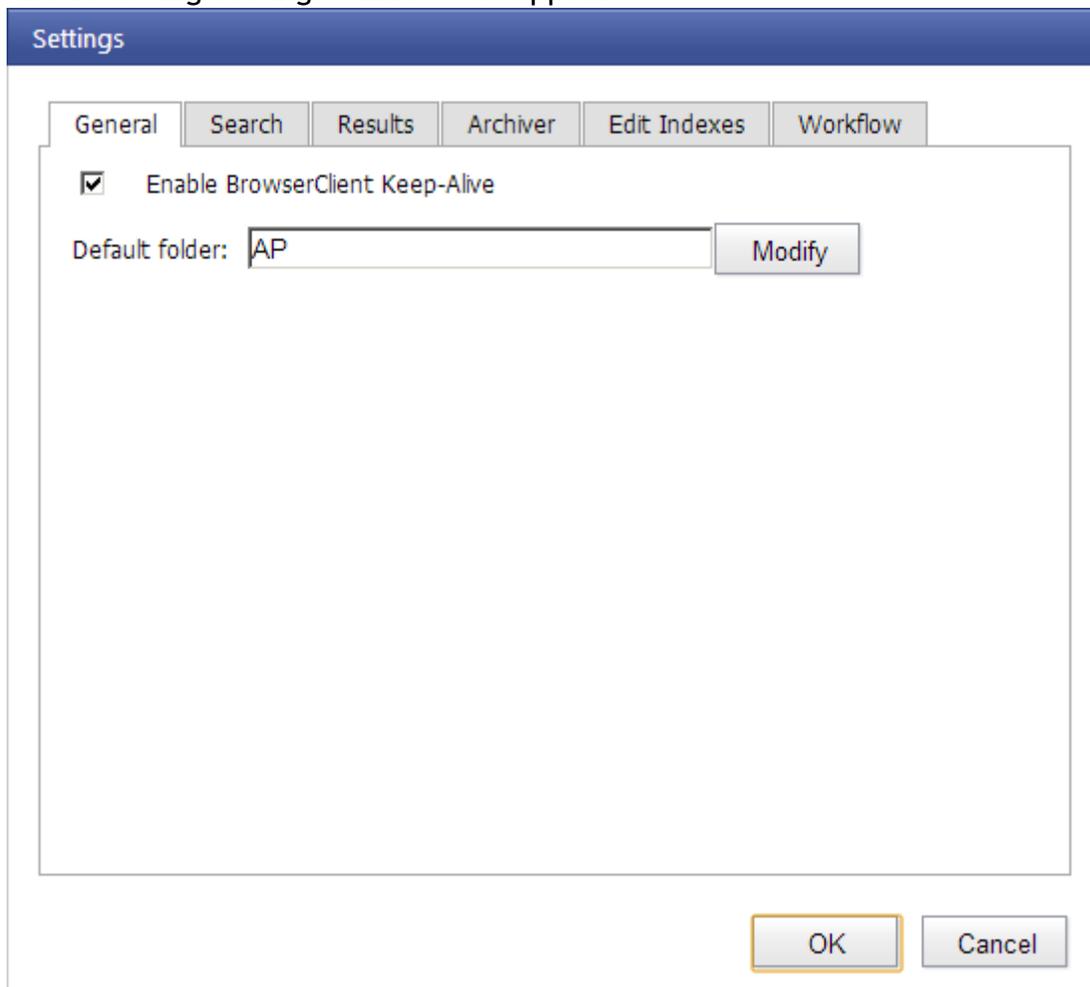ion is OFF, the predefined timeout period (usually between 5 and 20 minutes) will force the user to login again if the Web Client browser has a period of inactivity for as long or longer than the timeout period.

NOTE: This option will only appear if it is enabled on the FileNexus Server.

Default Folder
When a user logs into the Web Client for the first time, the cursor will highlight the FileNexus Server name in the folder tree. If a user typically searches on the same folder (or parent folder) most of the time, they may set the "Default Folder" so that each time they log into the Web Client, the default folder is already highlighted and they can immediately conduct their desired search. To select a "Default Folder", simply click the Modify button and select the folder from the window that appears before hitting OK.

Search Tab
The Search tab allows a user to set their search preferences which will persist based on their login credentials.

Allow search settings to be persisted
By default, this option is checked ON. This means FileNexus will track the user's Document Class and Subfolder Search preferences based on the folder being searched. If this option is turned OFF, all document classes and

subfolder searching will be assumed ON for all folders even if those preferences were changed on a previous search.

Allow search indexes to be reordered
By default, this option is checked ON. This means the user can reorder indexes on the Index Search tab of the search pane, for easier search criteria input. To reorder the indexes on the Index Search, click on the index name and drag and drop the index to the desired location.

Allow search index order to be persisted
By default, this option is checked ON. This means that any reordering of indexes in the search screens will persist based on the user's login credentials and browser being used.

Allow search index values to be persisted
By default, this option is checked ON. This means that FileNexus will track up to 5 of a user's previous search criteria in the Index Search Value edit boxes or drop downs. Additionally, the previous search criteria used for an index on a Document Class will appear in the Index Search Value until the value is changed or cleared in a subsequent search.

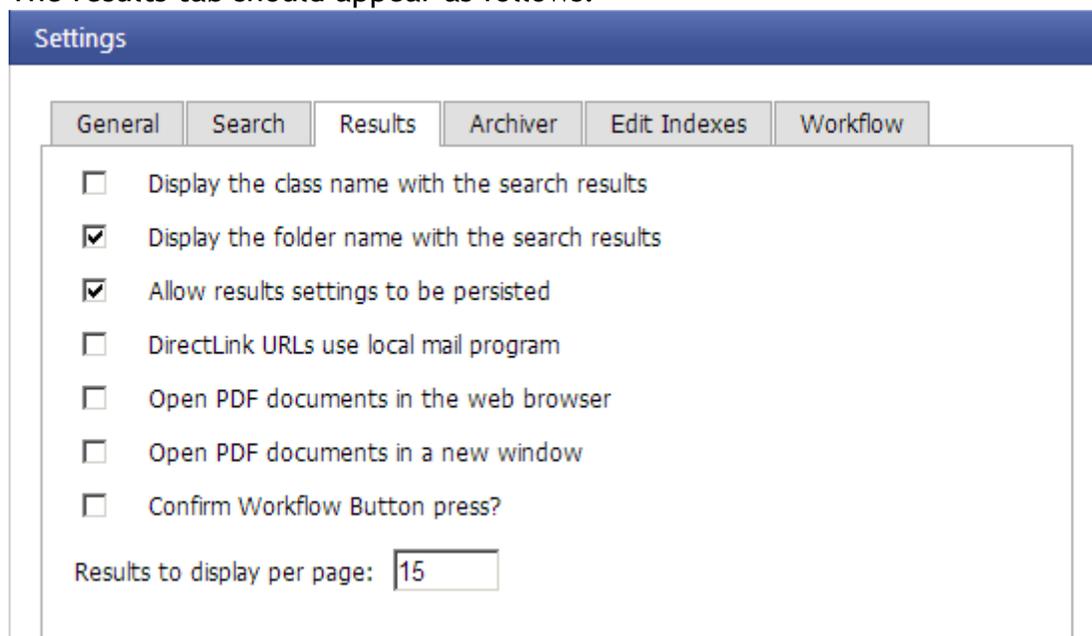**Allow search index operators to be persisted**
By default, this option is checked ON. This means that FileNexus will track the previous search's operators chosen (Equals, Less than, Contains, Between, etc.) based on the user's login credentials and browser being used.

Allow search index display to be persisted
By default, this option is checked ON. This means that any indexes set to display or not display (in the search results and/or on the search panes) will persist based on the user's login credentials and the browser being used.

Results Tab

The results tab should appear as follows.

Display the class name with the search results
When this option is enabled, the document class will be displayed as a column in the search results grid.

Display the folder name with the search results
When this option is enabled, the document folder will be displayed as a column in the search results grid.

Allow results settings to be persisted
If this option is checked ON, any grouping of search results, reordering of index columns, filtering boxes, etc. will persist based on the user's login credentials.

DirectLink URLs use local mail program
When this option is enabled, clicking the DirectLink URL for documents will result in the local mail program to be launched. Otherwise, the user can copy the link and paste it into another application or window.

Open PDF documents in the web browser
When this option is enabled, PDF documents will open in the same browser window.

Open PDF documents in a new window
When this option is enabled, PDF documents will open in a new browser window.
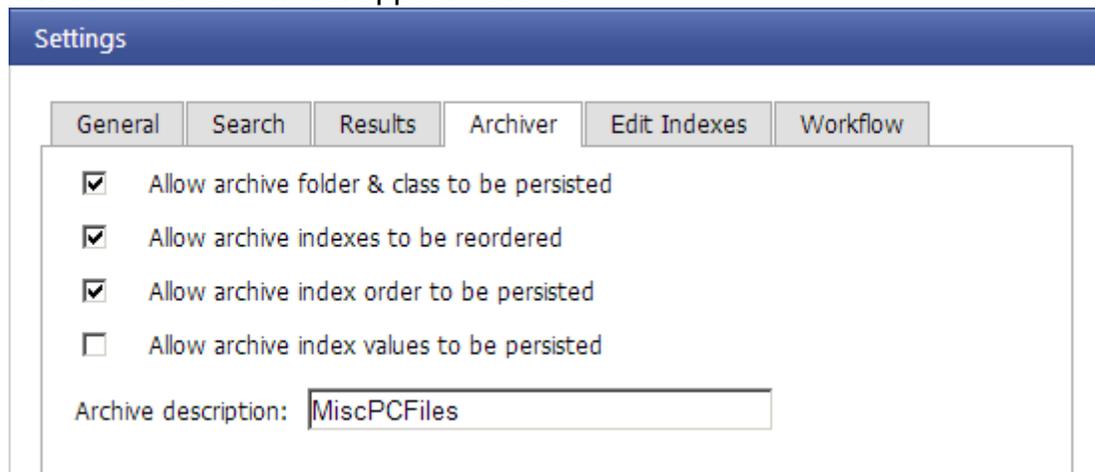
Confirm Workflow button Press
When this option is enabled, user will be notified upon clicking a workflow button to confirm the selection.

Results to display per page
This option sets the default number of documents that will be displayed per page in the search results page.

Archiver Tab

The Archiver tab should appear as follows.

Allow archive folder and class to be persisted
This option would allow you to save the previous folder and class that documents of the same file extension are archived to. This feature is useful when archiving documents of the same type that should go to the same folder and document class as it eliminates the need to choose the destination folder and document class for each document.

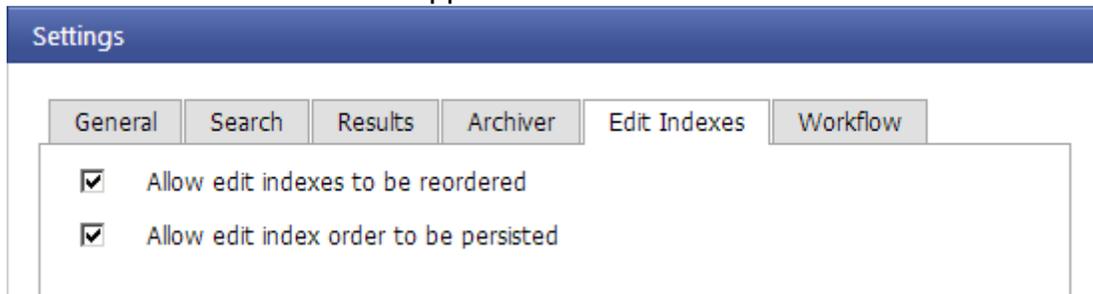**Allow archive input indexes to be persisted**
This option will allow you to keep previous input indexes when archiving new documents. This can be useful when importing similar documents to help minimize index input.

Archive description
This entry is an alias that corresponds to a folder path on the FileNexus Server. The alias or "Description Path" must already be set in the FileNexus Server Properties on the FileNexus Server. If this is left blank, documents being archived will route to the single default "Client Archive Path" defined on the FileNexus Server.

Edit Indexes Tab

The Edit indexes tab should appear as follows.

Allow edit indexes to be reordered
By checking ON this option, users with the rights to edit indexes for archived documents may reorder the indexes for easier value input.

Allow edit index order to be persisted
By checking ON this option, the reordering of indexes when editing values for archived documents will persist based on the user's login credentials and browser being used.

Workflow Tab

The Workflow tab should appear as follows.

Enable Workflow Task Notification
When this option is checked ON, a notification window will appear on the bottom right corner of the screen notifying users of new task assignments.

Auto-Close Workflow Notification
When this option is checked ON, workflow notification will be displayed for a few seconds and then automatically close. Otherwise the user will need to manually close the notification window.

Tasks refresh Interval
You can set a duration (minimum 10 seconds to maximum 3600 seconds) which
will trigger the Task count to be refreshed on the web browser.

End of Document